

It's the *easy* way to do good.

**United
Way**



TM

Sioux Empire United Way

2022 Campaign Chair

Brian Bird
NorthWestern Energy

IT'S THE EASY WAY TO DO GOOD.



2022 Campaign Goal:

\$10,050,622

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Introductions

- Name & Company
- United Way experience
- Why did you say yes?
- What would you like to get from today's training?



United Way!

- Funds 85 programs through 40 agencies in the Sioux Empire
- Fights for Children, Vulnerable Adults, and People in Crisis
- Serves 1 in 3 individuals
- Funds stay local
- 90 cents of every dollar goes directly to programs
- Operates with just 9 paid staff and hundreds of volunteers
- Serves 33 communities in our 4 county area

2022 Campaign Video

*How do we decide what
programs get funding?*

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Community Impact
Team Chair

Adrienne McKeown

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2022 Funding Decisions

- Approximately 60 volunteers
- 1000+ hours
- 40 agencies, 85 programs

Community Impact Timeline

December – January: Applications Available

February: Volunteer Preparations

March-April: Review Process

May: Goal is Set!

Recent Changes

- Online process
- Two-year funding cycle
- Virtual Review Meetings

Funding Considerations

- Need: How important is the service to the community?
- Outcomes: How effective is the service?
- Stage of development: Is the need increasing or decreasing?
- Financing pattern
- Management – overall effectiveness and efficiencies of the program.

Reasons for Funding Increases

- New program - didn't receive funding in 2021
- Increasing community need
- Expanding programming – serving more individuals
- Showing strong outcomes

Reasons for Funding Decreases

- Self-sufficient – strong reserves
- Program/organization stronger financially
- Lack of community need
- Not showing strong outcomes
- Concerns with overall efficiencies
- Lack of clarity with financial information

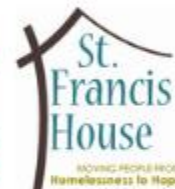
the community outreach



BOY SCOUTS OF AMERICA
SIOUX COUNCIL



Children's Inn
A program of
CHILDREN'S HOME SOCIETY



40 AGENCIES, 85 PROGRAMS



Sioux Empire United Way

Questions?

Agency Speaker

Janean Michalov

Furniture Mission

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Your Role

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ECM Job Description

Employee Campaign Managers (ECMs), are responsible for leading a company's internal United Way campaign. It is their responsibility to coordinate, publicize, and ensure the success of the employee campaign within their organization.

HCC Job Description

Heart Club Coordinators (HCCs) serve as the company's leader in promoting the Heart Club and Rising Heart Club and increasing the company's leadership giving participation. The main role is to promote leadership giving and make it visible throughout the campaign.

Working with your Loaned Executive

- Each company is assigned a Loaned Executive.
- Loaned Executives (LEs) work as your United Way liaison to help you run a successful employee campaign.
- LEs can help you:
 - Set goals
 - Come up with new ideas for giving and special events
 - Set up agency speakers
 - Arrange agency tours
 - Get materials (pledge cards, posters, videos)
 - Finalize your campaign
 - Set up online giving

Some companies prefer utilizing their LE more than others. Regardless of what your needs are, please let your LE know of your plans, strategies, and timelines to report back to the United Way office!

Responsibilities & Timelines:

Ensure your company has a successful United Way campaign!

- Attend training. Even if you have attended in the past, training is a key step to success.
- Attend an agency tour. See your United Way dollars at work! This is a great way to see behind the scenes and have stories and testimonials to share with your company's employees.
- Analyze your company's past campaign history. Identify opportunities for this year's campaign.
- Set goals.
- Recruit an internal committee to help you with the campaign. Successful committees have a representative from all areas/departments of the organization.



Responsibilities & Timelines:

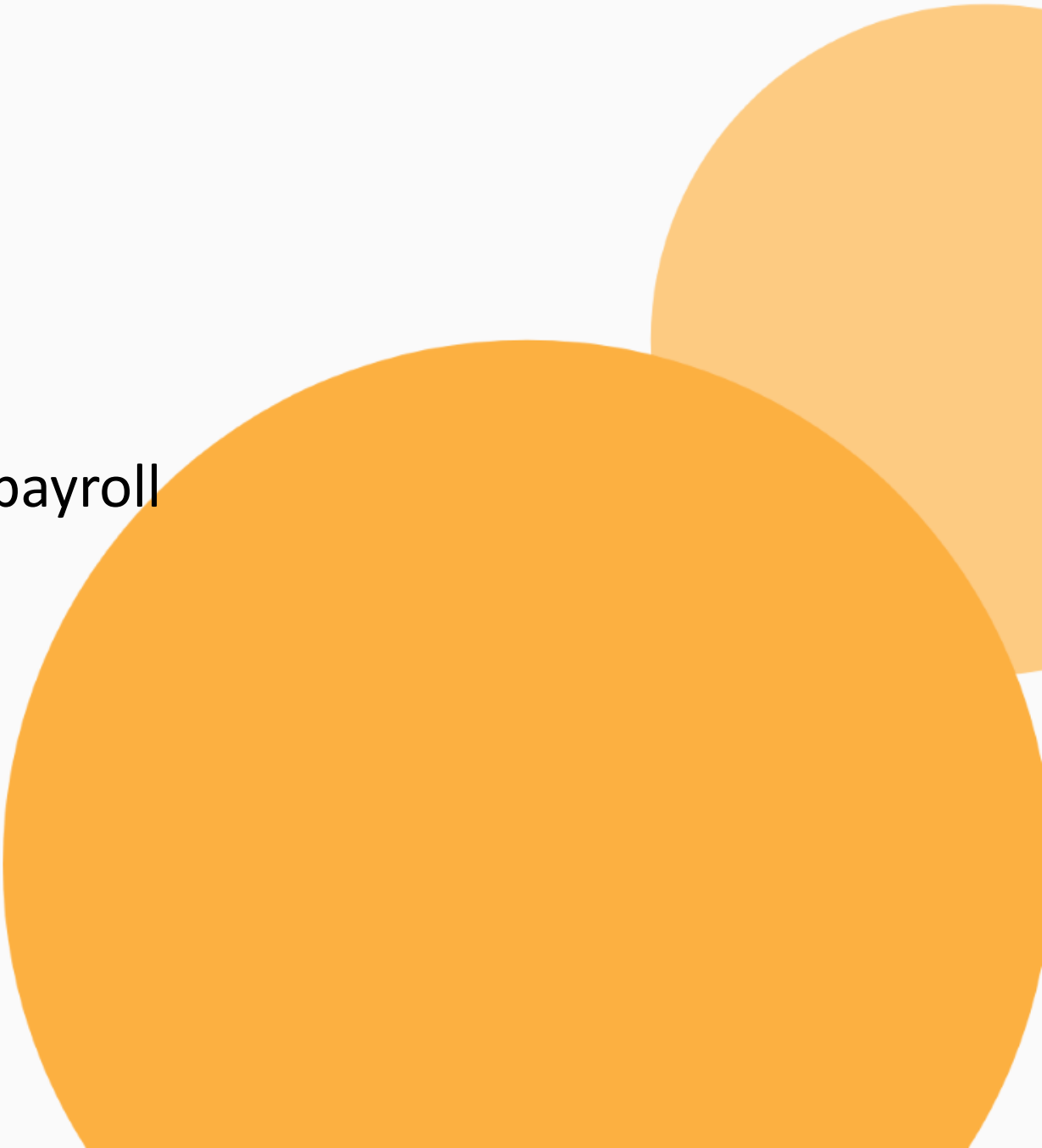
- Create a timeline for the company's campaign. Campaigns typically run in September and October.
- Internally publicize the campaign. Through e-mail, posters, personal notes, intranet, etc.
- Be the point of contact for United Way questions in your company.
- Increase your company's employee giving and participation by having fun and trying new things!

Strive to complete rallies by **October 31, 2021**. Make every effort to submit the company's totals within two weeks of the company's campaign completion. Results must be to the United Way office by December 31st.

Sample Rally:

Item	Presenter	Time
Welcome	ECM	1 minute
Endorsements	CEO/Manager	2 minutes
Campaign Overview <ul style="list-style-type: none">• What is Sioux Empire United Way?• How does SEUW help me help my community?• How are funds distributed?	ECM/LE	4 minutes
Guest Speaker <ul style="list-style-type: none">• Where do your dollars go?• Why give?	SEUW staff or volunteer	8 minutes
Campaign Video	SEUW staff or on our website	4 minutes
Make the ask and Q&A	ECM	2 minutes
Closing Remarks <ul style="list-style-type: none">• Thank volunteers/presenters/attendees• Collect pledge cards or set collection deadline• Stay to answer any questions	ECM	3 minutes

Make the Ask

- Educate & engage employees
 - Promote ease of giving through payroll deduction
 - Try to make personal touches
 - Use your committee to help
 - Set an end date
- 
- The slide features two large, overlapping orange circles on the right side. The front circle is a darker shade of orange and is positioned lower and further to the left, while the back circle is a lighter shade and is positioned higher and further to the right.

Say THANKS!

- Publically report your results
- Celebrate!



Engaging Employees

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SPECIAL EVENTS

The United Way Campaign can be a great opportunity to come together, especially after a long year of being apart. Below are some suggestions to get your creativity flowing for some fun and high-energy ways to make the campaign visible, thank employees, and have a blast!

- **United Way Trivia**—work with United Way staff to create a trivia game that employees can participate in each day
- **United Way Agency Tours**—set up company exclusive tours at our funded agencies. Contact annie@seuw.org to facilitate.
- **Grill Out for United Way**—host a BBQ and grill up some burgers and brats for your employees.
- **Corn Hole/Bags**—host a corn hole/bags tournament. Employees can buy in to participate on teams.
- **Cooking Contest**—employees can enter their best salsa/chili/soup/etc. recipe and face off to see who comes out on top!
- **Decorate your Door/Cubicle**—decorate your door/cubicle with a United Way theme. Winner wins a prize!
- **Treasure Hunt**—ECMs hide clues around the office for employees to find in their free time
- **Exercise Challenge**—challenge employees to log their miles and have a contest for who can walk/bike/run the most
- **Hole in One for United Way**—host a golf outing or putting contest for employees

CAMPAIGN INCENTIVES

We know the Sioux Empire is filled with generous people who give from the heart. Providing incentives for giving and participation can be a great way to say “thanks!” Below is a list of incentives that employers have used to encourage a gift to the community through United Way:

- **Paid Time Off** for pledging at least 1 hour of pay/month.
- **Logo Wear** jackets or polos for all individuals who pledge at the Heart Club level.
- **Jeans Days** or Business Casual for all departments with 100% participation.
- **Treats** for participation, wrapped and delivered to homes or workstations.
- **Volunteer time** and the ability to attend agency tours during the work day.
- **Closing the Office** one hour early the day before Thanksgiving for 100% participation.
- **Saturdays Off** for the quarter for one lucky individual who pledges Heart Club and gets drawn.
- **Quarterly Heart Club Events** like breakfast or happy hour for all Heart Club givers.
- **Lunch** provided to all employees at some point in the year.
- **Prizes** like gift cards, tickets, gift baskets, and raffle items.

Agency Tours

- A full schedule can be found in your folders
- RSVP online at seuw.org/agency-tours
- Set up special group tours on date that work for your team
- Offer incentives for attending tours
 - Raffle tickets
 - X hours of PTO to volunteer
 - Free lunch



Emerging Leaders

- Learn, Connect, Serve & Share in Your Community
- Young Professionals Group
- Hands on events at our United Way Funded Agencies
- Visit seuw.org to join!



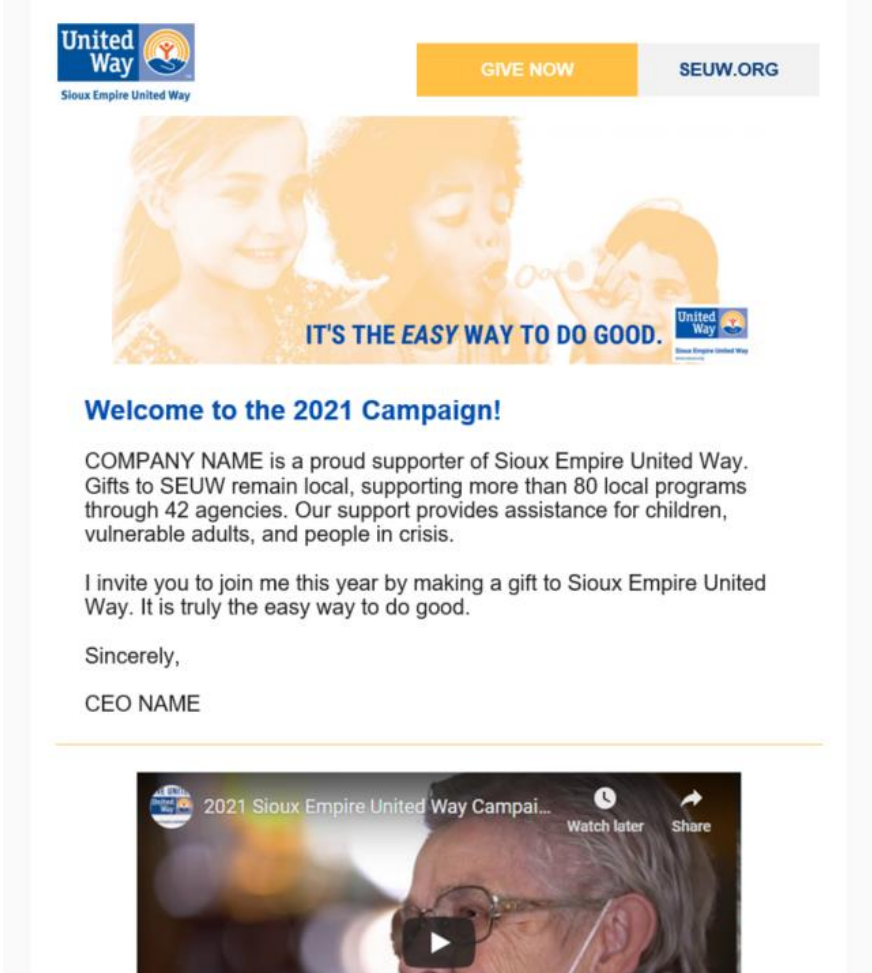
Speakers Bureau

- Schedule an agency speaker that will appeal to your employee demographic
- Speakers can be requested through your Loaned Executive, the United Way office, or online at www.seuw.org/speakers-bureau



Email Templates

- Three ready-to-edit email templates
- Available online in the Campaign Toolkit
- Include videos, testimonials, photos, etc.
- Editable
 - Add a message from your CEO, timelines, incentives, etc.



The screenshot displays an email template for the 2021 Sioux Empire United Way Campaign. At the top left is the United Way logo with the text "Sioux Empire United Way". To the right are two buttons: "GIVE NOW" in a yellow box and "SEUW.ORG" in a grey box. Below these is a large image of three children blowing bubbles, with the text "IT'S THE EASY WAY TO DO GOOD." overlaid. The main body of the email begins with "Welcome to the 2021 Campaign!" followed by a paragraph: "COMPANY NAME is a proud supporter of Sioux Empire United Way. Gifts to SEUW remain local, supporting more than 80 local programs through 42 agencies. Our support provides assistance for children, vulnerable adults, and people in crisis." This is followed by an invitation: "I invite you to join me this year by making a gift to Sioux Empire United Way. It is truly the easy way to do good." The email concludes with "Sincerely," and "CEO NAME". At the bottom, there is a video player showing a close-up of an elderly woman's face, with the title "2021 Sioux Empire United Way Campai..." and "Watch later" and "Share" buttons.

Questions?

Online Giving

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Online Pledge Payment Form

- <https://www.seuw.org/civicrm/contribute/transact?reset=1&id=25>
- Customize header, contribution amounts
- Only allows:
 - Payroll Deduction and Credit Card (one time or monthly)
 - Direct Bill and Credit Card (one time or monthly)
- SEUW provides you final giving report spreadsheet

IT'S THE EASY WAY TO DO GOOD.

Custom URL & Form Title

Thank you for considering a gift to Sioux Empire United Way!

Your gift supports children, vulnerable adults, and people in crisis.

Consider your impact:

- \$1 per week = 6 months of art supplies for a childcare center.
- \$2 per week = 2 music therapy sessions for older adults with dementia.
- \$5 per week = 25 people with suicide crisis support, resources, and intervention.

Heart Club gift:

- Rising Heart (minimum of \$250 rising to \$500 within 5 years)
- Golden Heart (\$500-\$749)
- Golden Heart Plus (\$750-\$999)
- Grand Heart (\$1,000-\$1,499)
- Grand Heart Plus (\$1,500-\$1,999)
- Heart of a Leader Bronze (\$2,000-\$3,499)
- Heart of a Leader Silver (\$3,500-\$4,999)
- Heart of a Leader Gold (\$5,000-\$9,999)
- Alexis de Tocqueville Society (\$10,000+)

Contribution Amount

\$ 50.00 \$ 100.00 \$ 250.00 \$ 500.00

Other Amount \$

I want to contribute this amount every month

Employee Information

First Name *

Last Name *

Email *

Company Name:

Spouse's Name & Employer to Combine Heart Club and Rising Heart Gift:

Payment Options

Payment Method

Debit/Credit Card

Payroll Deduction

Custom Content Ideas:
Company Goal
CEO Message
Incentives

Fit Your Needs:
Employee ID
Department
Location

Payroll & Credit Card
Or
Direct Bill & Credit Card

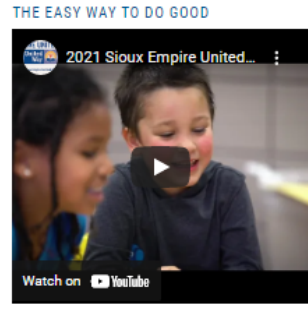
Online Pledge Form

- <https://www.seuw.org/2022-seuw-campaign-pledge>
- Customize header, gift options, payment type options
- Does not allow credit card payments on form, those need to be completed in separate secure payment form.
- SEUW provides you final giving report spreadsheet

IT'S THE EASY WAY TO DO GOOD.

Custom URL & Form Title

MESSAGE FROM THE CEO
Employees,
COMPANY NAME is a proud supporter of Sioux Empire United Way. Gifts to SEUW remain local, supporting more than 80 local programs through 42 agencies. Our support provides assistance for children, vulnerable adults, and people in crisis.
I invite you to join me this year by making a gift to Sioux Empire United Way. It is truly the easy way to do good.
CEO Name



Custom Content Ideas:
Company Goal
CEO Message
Incentives

COMPANY NAME SIOUX EMPIRE UNITED WAY PLEDGE FORM

Consider Your Gift Amount
Please consider a new gift or increasing your gift. It doesn't take much to make a BIG difference for the Sioux Empire.
• \$1 per week = 6 months of art supplies for a childcare center.
• \$2 per week = 2 music therapy sessions for older adults with dementia.
• \$5 per week = 25 people with suicide crisis support, resources, and intervention.

Join the Heart Club
• Rising Heart (Minimum gift of \$250 rising to \$500 within 5 years)
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• Golden Heart Plus (\$750-\$999)
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Pledge payment type*

- Select -
- Select -
- Payroll Deduction
- Cash or Check
- Automatic Bank Deduction
- Credit Card
- No gift at this time

Add or Remove Payment Options

Fit Your Needs:
Employee ID
Department
Location

Your Contact Information

Company

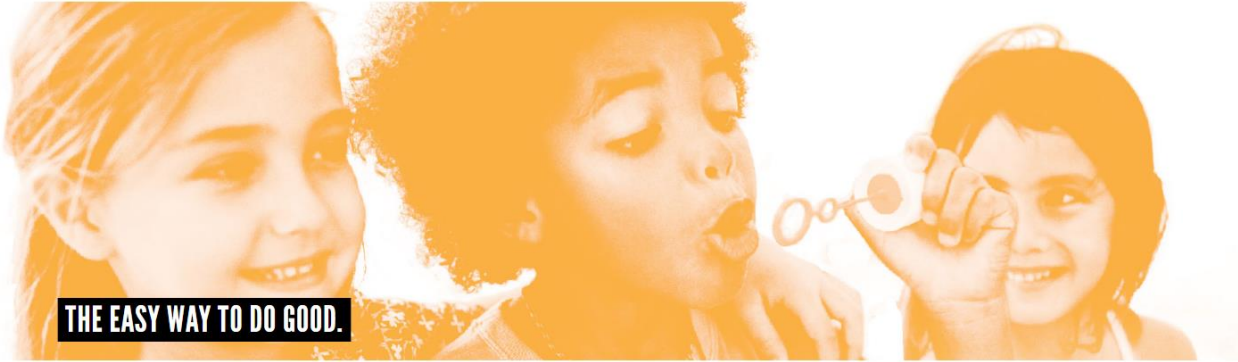
Email **Phone**

Address

Secure Online Employee Giving – e-Pledge

- <https://give.seuw.org>
- Customize content, payment options, and more
- Allows volunteer or payroll access to track campaign and run reports
- Requires user ids and passwords assigned to all employees (SEUW staff assist with the process)

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Homepage Content:
Company Goal
CEO Message
Incentives
Campaign Video
Giving Thermometer

WELCOME TO SIOUX EMPIRE UNITED WAY'S UNITED WAY CAMPAIGN!

Your gift helps children, people in crisis, and vulnerable adults through more than 80 programs in Lincoln, McCook, Minnehaha, and Turner Counties. Use the menu on the top to make a pledge or view previous giving history. Please visit www.seuw.org to learn more about how your gift is making a difference.



Add or Remove
Payment Options

Please select your pledge type.

- Payroll Deduction
- Credit Card (one time payment today)
- Credit Card (monthly payments)
- Cash
- Check
- Direct Bill (for pledges of \$100 or more)
- I do not wish to give at this time

Content Ideas:
Incentives
Goals

Consider Your Gift Amount

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Deduction Per Pay:

Pay Periods Per Year:

Number Of Deductions To Make:

Questions?

Heart Club

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Corporate Gifts Team Chair

Monie Siemonsma

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What is Heart Club?

- The Heart Club is the leadership giving program of Sioux Empire United Way. Any individual/couple who gives \$500 or more (about \$10/week) is considered a Heart Club member

Rising Heart

- Rising Heart is Sioux Empire United Way's introductory level to Heart Club.
- Givers make a minimum pledge of \$250 (or \$5/week) with a plan to increase their pledge over five years to \$500 (or \$10/week).



Heart Club

- Started with 124 members in 1984 – 4.4% of the campaign

2021 Campaign:

- 6,900 individuals
 - Includes 1,041 individuals who pledged at the Rising Heart level
- Contributed \$5,464,465
- 54% of Campaign Total

Break

Review Your Giving History

Company Name

<p><u>Contacts</u> Chief Executive Officer</p> <hr/> <p>Employee Campaign Manager Marketing Manager Ms. Brandi A.</p> <hr/> <p>Co-ECM Miranda A.</p>	<p>Company Contact Info Sioux Falls, South Dakota 57110 United States of America</p> <p>Account#: 10801 Ext. Account: 64811 Unions: No</p> <p>Business # : (605) 330-4125 FAX Number : (unknown)</p> <p>Structure Nodes:</p> <table border="1"> <thead> <tr> <th>Campaign Type</th> <th>Campaign Account</th> <th>Structure Node</th> </tr> </thead> <tbody> <tr> <td>All</td> <td>All Campaigns</td> <td>2021/MAIN/Team 1/Major Firms A/Major Firms A (5)</td> </tr> </tbody> </table> <p>Corporate Giving:</p> <table border="1"> <thead> <tr> <th>Year</th> <th>Pledges</th> <th>% Chg</th> <th># of Empl</th> <th>Per Capita</th> <th>Total Giving: Pledges</th> <th>Total In</th> <th>% Chg</th> </tr> </thead> <tbody> <tr> <td>2021</td> <td>0</td> <td>-100.0%</td> <td>239</td> <td>0.00</td> <td>0</td> <td>0</td> <td>-100.0%</td> </tr> <tr> <td>2020</td> <td>8,000</td> <td>6.67%</td> <td>239</td> <td>33.47</td> <td>83,841</td> <td>83,841</td> <td>12.74%</td> </tr> <tr> <td>2019</td> <td>7,500</td> <td>0.0%</td> <td>260</td> <td>28.85</td> <td>74,366</td> <td>74,366</td> <td>-12.66%</td> </tr> <tr> <td>2018</td> <td>7,500</td> <td>0.0%</td> <td>315</td> <td>23.81</td> <td>85,149</td> <td>85,149</td> <td>8.55%</td> </tr> <tr> <td>2017</td> <td>7,500</td> <td>0.0%</td> <td>310</td> <td>24.19</td> <td>78,444</td> <td>78,444</td> <td>0.0%</td> </tr> </tbody> </table> <p>Employee Giving:</p> <table border="1"> <thead> <tr> <th>Year</th> <th>Pledges</th> <th>Special Events</th> <th>S/E and Employee</th> <th>% Chg</th> <th>.. # Empl</th> <th>Of .. Donor</th> <th>% Part</th> <th>Avg. Gift</th> <th>Per Capita</th> </tr> </thead> <tbody> <tr> <td>2021</td> <td>0</td> <td>0</td> <td>0</td> <td>-100.0%</td> <td>239</td> <td>0</td> <td>0.0%</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>2020</td> <td>75,841</td> <td>0</td> <td>75,841</td> <td>13.42%</td> <td>239</td> <td>180</td> <td>75.31%</td> <td>421.34</td> <td>317.33</td> </tr> <tr> <td>2019</td> <td>66,866</td> <td>0</td> <td>66,866</td> <td>-13.84%</td> <td>260</td> <td>159</td> <td>61.15%</td> <td>420.54</td> <td>257.18</td> </tr> <tr> <td>2018</td> <td>77,343</td> <td>261</td> <td>77,604</td> <td>9.39%</td> <td>315</td> <td>198</td> <td>62.86%</td> <td>390.62</td> <td>245.53</td> </tr> <tr> <td>2017</td> <td>69,763</td> <td>1,181</td> <td>70,944</td> <td>0.0%</td> <td>310</td> <td>186</td> <td>60.0%</td> <td>375.07</td> <td>225.04</td> </tr> </tbody> </table> <p>Leaders: Heart Club</p> <table border="1"> <thead> <tr> <th>Type</th> <th>2021</th> <th>%</th> <th>2020</th> <th>%</th> <th>2019</th> <th>%</th> <th>2018</th> <th>%</th> <th>2017</th> </tr> </thead> <tbody> <tr> <td>Total Leaders</td> <td>0</td> <td>-100.0%</td> <td>147</td> <td>15.75%</td> <td>127</td> <td>-19.62%</td> <td>158</td> <td>17.04%</td> <td>135</td> </tr> <tr> <td>Leader \$</td> <td>0</td> <td>-100.0%</td> <td>73,710</td> <td>13.85%</td> <td>64,742</td> <td>-11.11%</td> <td>72,834</td> <td>12.36%</td> <td>64,823</td> </tr> </tbody> </table> <p>Techniques: (none)</p> <p>Award: (none)</p>	Campaign Type	Campaign Account	Structure Node	All	All Campaigns	2021/MAIN/Team 1/Major Firms A/Major Firms A (5)	Year	Pledges	% Chg	# of Empl	Per Capita	Total Giving: Pledges	Total In	% Chg	2021	0	-100.0%	239	0.00	0	0	-100.0%	2020	8,000	6.67%	239	33.47	83,841	83,841	12.74%	2019	7,500	0.0%	260	28.85	74,366	74,366	-12.66%	2018	7,500	0.0%	315	23.81	85,149	85,149	8.55%	2017	7,500	0.0%	310	24.19	78,444	78,444	0.0%	Year	Pledges	Special Events	S/E and Employee	% Chg	.. # Empl	Of .. Donor	% Part	Avg. Gift	Per Capita	2021	0	0	0	-100.0%	239	0	0.0%	0.00	0.00	2020	75,841	0	75,841	13.42%	239	180	75.31%	421.34	317.33	2019	66,866	0	66,866	-13.84%	260	159	61.15%	420.54	257.18	2018	77,343	261	77,604	9.39%	315	198	62.86%	390.62	245.53	2017	69,763	1,181	70,944	0.0%	310	186	60.0%	375.07	225.04	Type	2021	%	2020	%	2019	%	2018	%	2017	Total Leaders	0	-100.0%	147	15.75%	127	-19.62%	158	17.04%	135	Leader \$	0	-100.0%	73,710	13.85%	64,742	-11.11%	72,834	12.36%	64,823
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Setting Your Goal

- Identify your companies SWOT analysis: Strengths, Worries, Opportunities, Trends
 - Low participation? Set a goal to get more people involved.
 - Low average gift? Set a goal to get more people started with Rising Heart/Heart Club.
- Review company award categories
- Work with your Loaned Executives for ideas on accomplishing these goals.

Idea Sharing

Small Group Idea Sharing

- What do you do to reach every employee?
- How are you using the techniques?
- How are you making the UW campaign visible?
- What ways do you thank your employees?
- How do you encourage participation?
- What do you do to make your campaign fun?
- What do you do for Heart Club? Rising Heart?
- Do you set goals? How do you make them visible?
- Have you used any online tools? What were they and how were you successful/unsuccessful?

IT'S THE EASY WAY TO DO GOOD.

SEUW President

Jay Powell

IT'S THE EASY WAY TO DO GOOD.



Campaign Resources

- Brochures, Heart Club Books, Posters
- www.seuw.org
 - Campaign Toolkit
 - Tour Sign-Up
 - Agency Speakers Requests
 - “In Your Town”
- Casual Day stickers

Next Steps

- Plan Campaign
 - Meet with committee
 - Determine
 - Goals
 - Themes
 - Rally Date
 - Activities & Incentives
 - Deadlines & Timelines
 - Update LE on all of the above



QUESTIONS?



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PRIZES!



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THANK YOU!!!